



DocuWare 7.13
User Manual
Document Capture & Storage



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Introduction

This document gives an overview of the DocuWare front end and a detailed breakdown of the functions available to the end user with use cases where appropriate.



User Interface

This is the DocuWare interface you will see. Please see next page for explanation of each numbered feature.

The screenshot displays the DocuWare interface with the following numbered features:

- 1:** User profile (paul.admin) and company name (Keeley Travis Business Solutions Ltd).
- 2:** DocuWare logo.
- 3:** Document trays menu.
- 4:** Search icon.
- 5:** Lists icon.
- 6:** Tasks icon.
- 7:** Folders icon.
- 8:** Forms icon.
- 9:** Store button.
- 10:** Document thumbnail and metadata (54982, Flying Tom, Thomas Rain).
- 11:** Document content area.
- 12:** Tools panel (display, zoom, etc.).
- 13:** Document title (Business Service Agreement Sample).
- 14:** Document header (Peters Engineering logo and contact info).
- 15:** Document footer (Business Service Agreement Sample, docx, 30/10/2024, 3,211 KB).

The document content includes:

Business Service Agreement Agreement Number 54982

THIS BUSINESS SERVICE AGREEMENT dated December 5, 2024 by and between Peters Engineering (Contractor), a New York Corporation and the Recipient.

Recipient Company Name: **Flying Tom**
 Recipient Contact Name: **Thomas Rain**
 Recipient Email: **Click or tap here to enter text.**
 Recipient Phone Number: **N/A**

Project: Leisure Park Roller Coaster

1 Scope of Work

- The contractor shall furnish all the material and perform all the work on the project as shown on the drawings and as described in the specifications, all in accordance with scope described herein and the terms of the agreement document.

2 Payment Terms

- Payment terms: Not 30 days.
- The agreement amount shall be **\$13,000**.

3 Time of Completion

- The contractor shall employ persons of competence and skill to complete the project within 15 days of the signed agreement.

Peters Engineering looks forward to doing business with you.
 The undersigned agrees to the terms of this agreement.



DocuWare UI Key

The items highlighted in bold relate directly to storing documents within DocuWare.

1. The User menu where users can access Profile & Settings, connect to Desktop apps and more. Click for dropdown menu
2. **Document Tray - this is where most documents will be imported to, ready for storing in DocuWare. You could have access to multiple Document Trays for different reasons. Note: If you have no access to Document Trays, this tab will not appear.**
3. Search - this is where you search the file cabinet(s) you have access to for store documents
4. Lists - lists of documents that meet certain criteria, defined by administrators
5. Tasks - if you are required to make an action on a document determined by another user or a workflow, your Task will appear here
6. Folders - access to organised Folders of documents to which you have been given permission
7. Forms - digital forms that can be filled in and stored directly into a DocuWare file cabinet
8. **Your import options to transfer documents to your Document Tray**
9. **The Store button - when you want to store a document from your Document Tray to a file cabinet**
10. **A document in your Document Tray**
11. **The document viewer - shows the document you are currently working on. Double click a document on the left in Document Tray or from a Search to open it in the document viewer**
12. Toolbar providing many ways to work with the selected document
13. Navigation menu to switch between documents and pages of documents
14. Zoom functions to zoom in and out of the document for better reading
15. Document specific information - filename, file type, creation date



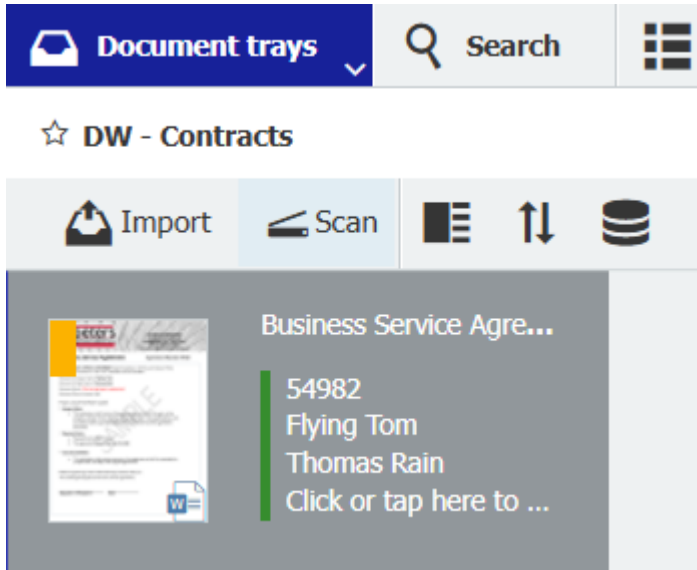
Document Trays

Please note: The screenshots in this document are from a demo system and will not necessarily reflect your system precisely.

Each Document Tray is connected to a specific file cabinet for faster storage, though you can store documents from any tray to any cabinet depending on the Store dialog you use.

The Document Tray is where you put documents ready to store in DocuWare. Documents can be imported to the tray through a variety of methods:

- From a Watched email folder
- The Import button (see below)
- Drag-and-drop
- The File and right-click menu from various applications
- From a scanner
- From a Watched Folder (any documents put in the folder manually or from a scanner will be automatically imported to the Document Tray)



The Import button can be found here. Click, navigate to your document and store.

If a scanner is connected to your local PC you can click Scan a document directly to the tray.

The tools to the right of the Scan button are:

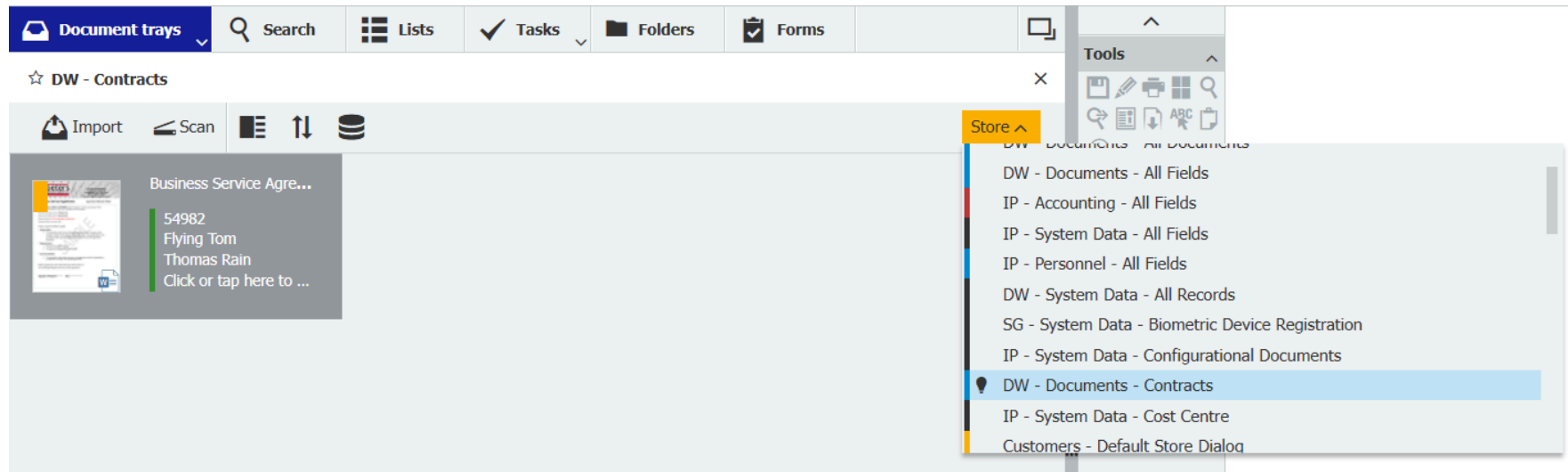
- Views - changes the view of the documents in the tray (ie, Table View)
- Sorting - with various options such as Name and Type
- Store Dialog List - opens and closes a list of store dialogs to the right of the tray



Storing a document from the Document Tray

Follow these steps to store a document.

1. Double click the document you wish to store - it will open in the viewer on the right
2. Click the yellow Store button and choose the correct Store dialog (typically this will be the one with the lightbulb icon next to it)





- If Intelligent Indexing is turned on for the target file cabinet DocuWare will pre-fill the index fields it recognises with information from the document

The screenshot displays the DocuWare interface for storing a document. On the left, a form titled 'Store to "DW - Documents"' contains pre-filled fields for document metadata:

- Document Type: Contract
- Document Number: 54982
- Company Name: Flying Tom
- Contact Name: Thomas Rain
- Subject: Lease Contract
- Project: Leisure Park Roller Coaster
- Document Date: 05/12/2024
- Contract Start Date: [Empty]
- Action Date: [Empty]
- Contract Expiration Date *: [Empty]
- Auto Renewal *: [Empty]
- Amount: [Empty]
- Email Message: Mark content in document (if available)
- Read permission: Mark content in document (if available)

On the right, a preview of the document is shown. The document is a 'Business Service Agreement' for 'Leisure Park Roller Coaster', dated December 5, 2024, between Peters Engineering and the Recipient. The agreement includes sections for Scope of Work, Payment Terms, and Time of Completion. A large 'SAMPLE' watermark is overlaid on the document preview.

- If Intelligent Indexing is not active or there are fields that need to be completed/amended, simply click into the field then highlight the required information on the document with a mouse click/drag
- Once all the required index fields are complete, click the yellow Store button
- The document will now be stored in the selected file cabinet and will be retrievable via the Search function



Storing Tips

- Where possible ALWAYS choose the Document Type from the dropdown menu
 - Ensures uniformity of data for easy retrieval
- When storing an invoice, ALWAYS select the Company from BELOW the line in the dropdown IF DocuWare hasn't recognised it automatically
- Index every other available field from the document using One Click / drag and highlight indexing where possible
 - This makes document retrieval easier
 - This trains Intelligent Indexing, resulting in less manual indexing
- **DOUBLE CHECK!** Ensure you have indexed the right information in the right fields BEFORE you click Store



DocuWare Desktop Apps

DocuWare Desktop Apps are installed locally to provide additional functionality for users. They are required for Outlook integration and Smart Connect functionality.

They include:

- Connect to Outlook
- Export
- Import
- Scan
- Print
- Smart Connect

DocuWare Desktop Apps can be installed by individual users or organisation-wide by IT departments using Silent Set Up.

Individual User Installation Instructions: <https://start.docuware.com/blog/product-news/desktop-apps-easily-installed>